

Transaction Supervisor's Forum 11/12/2015

PPSD provided the following updates at the forum:

Personnel and Payroll Operations Bureau (PPOB) management team

The PPOB management team has had recent changes. Below are the current members of the management team and their areas of responsibility:

Debra Spellman – Bureau Chief

Lina Ayala – Operations Manager – Payroll Office I and IV

Melody Lyles – Manager – Payroll Office I (Civil Service Audits, CSU Audits and Payroll, Position Control)

Pliny Reynolds – Manager – Payroll Office IV (Disability: IDL, NDI, SDI, TD)

Veronica Gutierrez – Manager – Retirement Reconciliation Team

Vacant – Operations Manager – Payroll Office II and III

Samantha Vance – Manager – Payroll Office II (Civil Service Payroll, Stipulations, Garnishments, Premium Pay, Direct Deposit)

Rhonda Townsend – Manager – Payroll Office III (Civil Service and CSU Benefits, W-2, and Miscellaneous Deductions)

Benefits Reminders

On November 13, 2015, the W-2 Unit will mail a listing of employees who have no mailing address on file to departments. Please have those employees complete a Standard Form 686 (Employee Action Request) as soon as possible to ensure correct mailing of their 2015 W-2. Per Payroll Letter 15-014, address changes must be keyed by December 18, 2015.

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Year-end Lump Sum Processing

SCO issued Payroll Letter #15-016, Separation Process with Lump Sum Deferrals on 11/05/2015

Key dates to remember:

- For employee's deferring in the 2015 tax year, SCO must receive PAR/PPT and supporting documentation no later than December 16, 2015.
- For deferrals in the 2016 tax year, documentation must be submitted by January 16, 2016.
- Tax exemptions expire on January 31, 2015, therefore process "permanent" EAR tax exemption transaction when submitting documents. See PAM, Section 10.16.1 for further instructions.

Disability Reminders

Important cutoff dates for 2015 year end processing:

December 2, 2015 – Submit Form STD 674D for transfer request from Regular pay to IDL with issue year 2012.

December 15, 2015 – Submit Form STD 674 for LC4800 payment request or transfers.

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Questions:

1. What date is PPSD currently working on?

As of 11/16/2015:

Unit	Workload Type	Oldest Date
Position Control	607	11/9/15
Audits	PARs	11/9/15
Disability	IDL Special/Complex	7/7/2015
	IDL Regular	11/9/2015
	SDI Special/Complex	10/29/2015
	SDI Regular	11/4/2015
	NDI Special/Complex	10/28/2015
	NDI Regular	11/3/2015
	TD Special/Complex	10/29/2015
	4400	11/09/2015
	4800	10/30/2015
Payroll	EH Messages	03/26/2015
	674	10/27/2015
	674 A/R	10/27/2015
Benefits	Health	10/26/2015
	FLEX	10/12/2015
	Dental Appeals/Changes	7/20/2015
	Dental Cancels	7/28/2015
	Dental New	11/12/2015
	Open Enrollment	10/30/2015
Misc. Deduction/W-2	674	10/30/2015
	676	5/11/2015
	EH Messages	10/14/2015
	Group Legal	11/13/2015
	LTD	11/13/2015
Retirement	EH Messages	08/12/15

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2. Have the Annual Employee Leave Balance reports been issued? If not, when should the department anticipate them being issued?

SCO discovered a problem when the Employee Statement of Leave report were printed in October. The report was not printed for the majority of departments, therefore, the reports are being printed at the beginning November. As a result, some departments may receive duplicate statements.

As a reminder, Departments have the option to have these statements printed during any month of the year. Due to large number of departments requesting the report to be printed in October, departments can experience delays if SCO experiences printing problems. Additionally, printing the reports during short months, such as February or November (due to the holidays), tends to cause a delay, since the 672's and pay warrants print jobs are higher priority than the Employee Statements.

If a department would like to change the month they received the Employee Statement of Leave, please contact the Leave Accounting Liaison at (916) 327-0756.